Getting Started with the AGENCYCENTRAL Custom Intranet

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About this Documentation

This booklet provides the basic instructions for installing and customizing your *AgencyCentral Custom Intranet*. Additional details are included in the "Help Desk" section of the intranet and we highly recommend that you and your staff review them carefully.

The following symbols are used throughout this document to alert you to important notes or provide you with tips on making the installation and customization process easier:

This symbol provides a warning or special instructions that you should follow carefully.

This symbol indicates a tip that is recommended for the smooth operation of your intranet.

Significant care has been taken to provide you with the most accurate documentation possible. If clarification is needed in any of the instructions, please notify us immediately so that we may make the necessary corrections.

This software has been designed with you in mind and we rely on your feedback to make it the best product possible. Please send your suggestions, comments and, yes, criticisms about our company and products to info@intranetconcepts.com or visit us on the World Wide Web at www.intranetconcepts.com.

Managing Your Intranet

Recommended Software

The instructions provided in this manual assume that you are using *Microsoft FrontPage* to customize and maintain your intranet. Not only does *FrontPage* allow you to easily add new pages and make changes to existing ones, but it also includes tools for managing the folder structure and checking for broken hyperlinks.

For details on this product, visit www.microsoft.com/frontpage on the Internet or call us and we will get a copy for you.

Required Software

The *AgencyCentral Intranet* was designed and tested using Microsoft Internet Explorer 5.0 and, therefore, contains various features that may not be compatible with Netscape or other Internet browser products. We strongly recommend that you install the latest version of Internet Explorer on all of your desktops in order to maintain consistency. You can download this free software at www.microsoft.com/ie.

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Installing Your Intranet

The following procedures should be done by your system administrator or someone in your office with a solid understanding of software installation. For assistance, please contact our technical support department.

Before you begin, close all other programs that are open in Windows on your server or PC workstation.

1. Setup will start automatically after you put the AgencyCentral CD into your CD-ROM drive. If it does not start automatically or if you have received the setup file via email or download:
   a. From your Windows desktop, double-click the *My Computer* icon
   b. Double-click on the appropriate drive icon for CD our installation media (hard drive, floppy drive or CD-ROM drive)
   c. Locate the **SETUP** (or **SETUP.EXE**), depending on your PC's configuration) file
   d. Double-click on the SETUP file to begin the installation process
2. The *Welcome* screen will appear
3. Click on the **Next** button to continue
4. The *License Agreement* screen will appear. Read it carefully and, if you agree with the terms, click on **Yes** to continue the installation
5. The *Choose Directory* screen will appear. If you are installing the software
   a. On a single workstation, click on **Next** to continue
   b. On a network drive, change the C: to the appropriate drive letter for your network then **Next** to continue
6. The *Select Program Folder* screen will appear
7. Click on **Next** to accept the default folder for your program icons
8. The *Start Copying Files* screen will appear
9. Click on **Next** to begin the installation. The files will be copied from the diskette to the hard drive
10. The *Setup Finished* screen will appear
11. Click on **Finish** to complete the setup process

When you have finished installing your intranet (and the FrontPage software), you are invited to call our Technical Support Team at 978-499-1897 for a quick walk-thru. It usually takes about 20 minutes and can help acquaint you with the overall structure and answer any immediate questions that you might have.

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Accessing Your Intranet

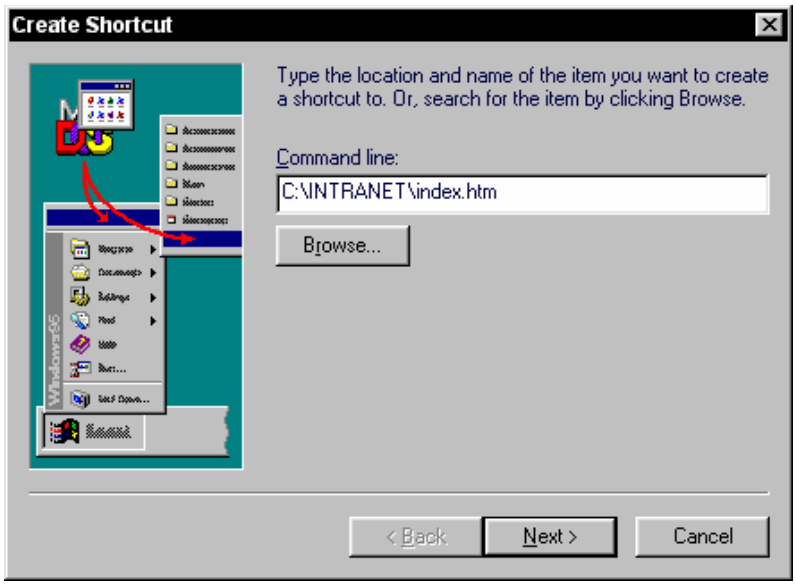
During the installation process, two icons are created on your workstation

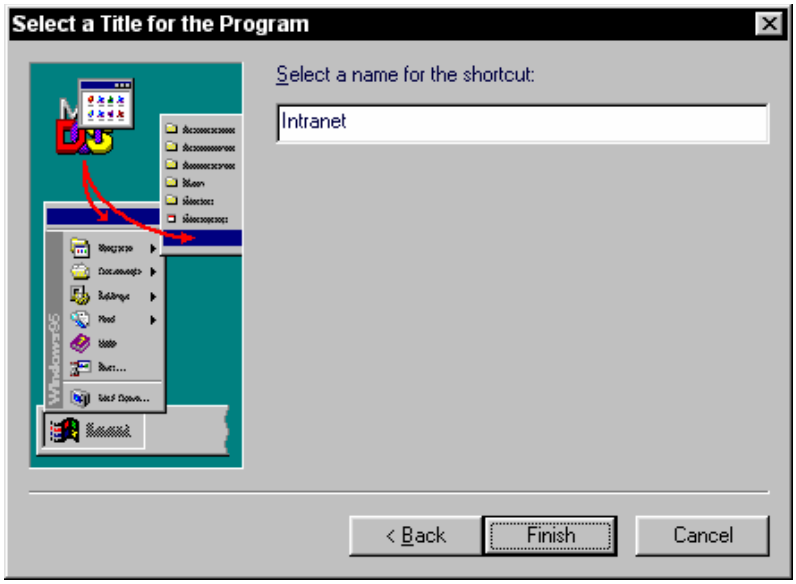
- The first icon appears on your Windows desktop. Double-click this icon to launch Internet Explorer and load your intranet home page.
- The second icon appears on your Start menu. Click on **Start** ® **Programs** ® **AgencyCentral Custom Intranet** ® **Intranet** to open your intranet.

Adding the Intranet icon to each workstation desktop

This procedure must be performed at each workstation that will access the intranet:

1. From the Windows desktop, right-click and select **New** ® **Shortcut** from the menu that appears
2. The *Create Shortcut* window will appear
3. In the **Command Line** field, type the path to your intranet home page, such as: **C:\INTRANET\index.htm**
   Note: If your intranet is installed on a network drive, replace the c: with the appropriate drive letter.
4. Click on the **Next** button to continue
5. In the *Select a Title for the Program* window, type the name that you want to appear under the icon.
6. Click on the **Finish** button to complete the process


Create Shortcut
Type the location and name of the item you want to create a shortcut to. Or, search for the item by clicking Browse.
Command line:
C:\INTRANET\index.htm
Browse...
< Back
Next >
Cancel



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Automatic Startup

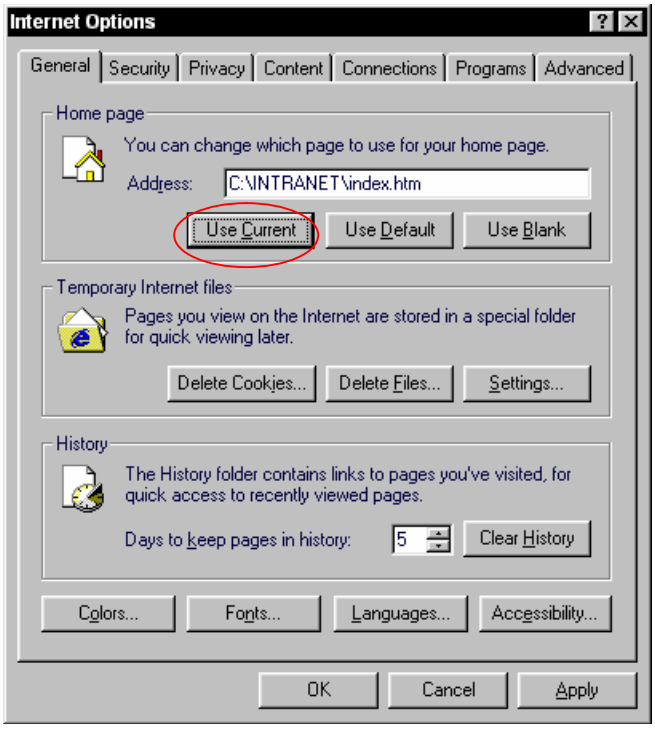
We recommend that you add a shortcut to the Windows *Startup* menu on all workstations. This will enable the intranet to open automatically when the PC is turned on.

1. Click on **Start ® Settings ® Taskbar & Start Menu**
2. Click on the **Start Menu Programs** tab
3. Click on the **Add** button
4. In the *Command Line* field, type **C:\INTRANET\index.htm**
   Note: If your intranet is installed on a network drive, replace the c: with the appropriate drive letter.
5. Click on the **Next** button
6. In the *Select Program Folder* window, click on the **Startup** folder
7. Click on the **Next** button
8. In the *Select a Title* window, type **Intranet** (or whatever you want to name your icon)
9. Click on the **Finish** button
10. Click on **OK** to close the *Taskbar Properties* window
11. When you restart your workstation, the intranet should open automatically.

Setting the intranet as your browser home page

You can also the intranet home page as your default browser home page in Internet Explorer by following these simple steps:

1. Double-click on the desktop icon to launch the intranet home page in Internet Explorer
2. Click on **Tools ® Internet Options**
3. On the *General* tab, click on the **Use Current** button. The contents of the Address field will change to reflect the path to your intranet home page.
4. Click on **OK** to save your changes and close the *Internet Options* window



From now on, when you click the **Home** button on your Internet Explorer toolbar, the intranet home page will appear.

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Customizing Your Intranet

The *AgencyCentral Custom Intranet* has been designed for agencies that want a working structure on which to build a customized web of internal information.

The **Help Desk** section provides details on customizing various pages, as well as tips for helping your staff become familiar with the powerful features of the intranet.

To help you get started, here are the instructions for customizing the some of the special pages in the intranet web:

These procedures must be done from a workstation that has Microsoft FrontPage installed on it.

Opening the Intranet for editing

1. Double-click on your intranet icon to launch the home page in Internet Explorer.
2. Click on **File ® Edit with Microsoft FrontPage**
   Note: If this prompt does not appear, you will need to install FrontPage on the workstation.
3. When FrontPage is finished loading your intranet home page, click on the **Folders** icon in the *Views* toolbar to view the intranet structure.
4. When you locate the file that you wish to edit, double-click on it to open it in *Page* view in FrontPage.

Intranet Home Page

Your Home Page is the first page of the intranet that you view. It actually displays other pages within “frames”, such as:

top.htm	This file contains the top border which includes the home icon and departmental folder tabs
contents.htm	This is the main section of your intranet, which includes the agency logo, calendar, Tips and Web buttons, as well as embedded frames for Daily News, random quotes and the Employee directory.
daily.htm	This file contains the Daily News and should be edited whenever you wish to change the items listed in the Daily News section

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contacts/agency.htm	This file contains the Employee Directory page, which is displayed on the home page as well as in the Contacts section of the intranet.

In order to edit a portion of this home page, you must first open the correct file (as shown above) then make your changes and click on **File ® Save**. The changes will appear automatically when you access the intranet home page in Internet Explorer. If necessary, press **F5** to "refresh" and reload the page with your changes.

Top Border

You will notice that every page in the intranet contains the same information. This information is stored in the **top.htm** file of your **INTRANET** folder. Here are a few ideas for information that you can include on this page:

- Agency Name
- Agency Address
- Telephone and Fax Numbers
- Web Site Address (if applicable)
- Link to your Office Directory (stored by default as branch/index.htm)

Depending on the amount of information involved, you may need to change the font.

On many 14" monitors, which are set to a low resolution, the entire top border (containing the department tabs) doesn't always fit on the screen. This results in horizontal scroll bars, which are unacceptable for daily use. If this is the case in your office, we recommend that you edit the top.htm page to remove the AgencyCentral graphic. You may replace the AgencyCentral graphic with another image, however, it cannot exceed a height of more than 23 pixels.

Daily News

This section appears in the left column of your intranet home page. It is important that you keep it up-to-date because it's the first page that your staff will see when they open the intranet each day.

1. Open the following file in your **INTRANET** folder: **daily.htm**
2. Type your news items in the table provided on this page, using a separate row for each item. If your news item refers to another page in the intranet (either existing or added for more details), be sure to hyperlink one or two of the keywords in the news items to that corresponding page.
3. When you are finished, click on **File ® Save**
4. The changes will appear automatically when you access the intranet home page in Internet Explorer. If necessary, press **F5** to "refresh" and reload the page with your changes.

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Departmental Home Pages

Each department's home page in your intranet contains a **contents.htm** that contains the list of hyperlinks to each file in its folder. Each folder also contains a **whatsnew.htm** file for displaying the department's "bulletin board", a place where you can communicate relevant news and information to your staff. It is important to keep this bulletin board up-to-date since it's the first page that users see when they visit a department.

You will edit the **contents.htm** document only if you are adding new documents to the specific intranet folder. Refer to the **Creating New Pages** section for details.

Updating the Departmental Bulletin Board

1. Open the following file in the appropriate departmental folder: **whatsnew.htm**
2. This page appears as a standard bulleted list.
3. Position your cursor at the beginning of the first line, after the bullet and before the first letter of the sentence
4. Press **ENTER** and the current line will move down, leaving a bullet and blank line above it
5. Move your cursor back to this new line and begin typing your message
6. Repeat Steps 3-5 for all of your new items
7. When you are finished, click on **File ® Save**
8. The changes will appear automatically when you access the departmental home page

Updating the Contacts Pages

The *Contacts* section consists of several pages with tables that provide contact information for the various categories. With respects to the Agency Contacts page, a section of it also appears in the right column of your intranet home page and provides a quick-reference list of the employees' names and telephone extensions. In order to update this page, follow these steps:

1. Open the following files in your INTRANET\contacts folder:

agency.htm	Employee List
branch1.htm	Branch List
carriers.htm	Company List
claims.htm	Claims List
reflist.htm	Internal References List (ie: Services)
vendors.htm	Vendor List

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2. These pages contain a table with the columns for names, numbers, etc. You should edit the table in the same manner as you would edit any other table.
3. To link an e-mail address to an individual's name:
   a. Highlight the name
   b. Click on **Insert ® Hyperlink**
   c. In the URL field, type **mailto:** followed by the e-mail address, such as mailto:paulr@intranetconcepts.com
   d. Click on **OK** to close the window
4. The name should now appear in blue underlined text in your table
5. When you are finished making changes, click on **File ® Save**
6. The changes will appear automatically when you access the intranet home page

If you add new Contacts pages, you must add hyperlinks to these new files in the **contents.htm** file (also stored in the *Contacts* folder)

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Creating New Pages

A **NEWPAGE.htm** file is included in each folder on your intranet and should be used as a "template" for adding new pages. It contains the standard formatting that will help you maintain a consistent style throughout the entire web.

Create the page

1. Decide in which folder the new page will be
2. Click on the **Folders** icon and locate the appropriate folder
3. Double-click the **NEWPAGE.htm** file in that folder to open it in *Page* view
4. *Immediately* click on **File ® Save As**
5. Type an appropriate name for the new file
6. Click on the **Change** button and type a title for the new file. It should coincide with the title that you will type in the blue title bar on the page.
7. Click on the **Save** button
8. The system will automatically add an ".htm" extension to the file to indicate that it is a web file. This new name will appear in the title bar of the document window.
9. Add your content to this new page
10. Click on **File ® Save** to preserve your changes
11. Click on **File ® Close** to exit this new document

Create the hyperlink

1. Open **contents.htm** in the folder that contains the new page
2. Move your cursor to where the link should appear
3. Type a 2-3 word description of the page
4. Select the description by dragging your mouse over the text (it will appear highlighted)
5. Click in **Insert ® Hyperlink**
6. Click on your new page to select it
7. Click **OK** to insert the hyperlink — the description will now appear in blue underlined text

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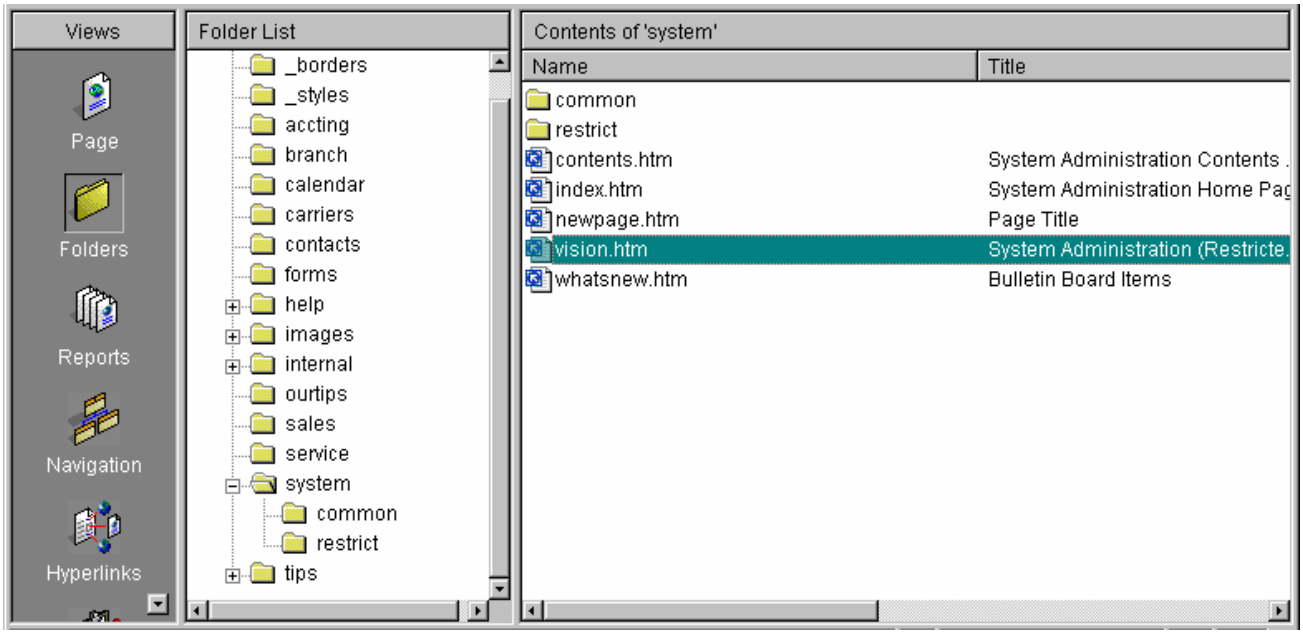
Changing the Restricted System Password

The restricted area of the System section in your intranet requires a password to access it. This password is currently set to vision, however, if you wish to change this password, simply open your intranet in Microsoft FrontPage and locate the vision.htm page in the \INTRANET\System folder. Rename this file to your new password.

For example, if you wanted to change the password to ddoc122, you would simply rename vision.htm to ddoc122.htm.

Be sure to maintain the .htm extension or the password script will not work properly.



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Backing Up Your Intranet

There are many backup applications on the market for copying your critical files to removable media such as tapes or CD-ROM diskettes. If you are running your intranet on a network, you're probably already performing regular backups on the LAN drive(s). Be sure to check the backup configuration to make sure that the **INTRANET** folder is included in these backups.

If you have installed your intranet on standalone PC workstations or a peer-to-peer network that doesn't get backed up regularly, you should use one of the following methods to make backup copies.

Backing Up a Single File

Before making changes to a single file in your intranet, we recommend that you make a copy of it. There are a few ways to do this:

From My Computer/Windows Explorer:

1. Close Microsoft FrontPage (if it is open)
2. Go to *My Computer* or *Windows Explorer*
3. Locate your **INTRANET** folder
4. Select the file you want to copy by single-clicking it
5. Press **CTRL+C** then **CTRL+V** to make a copy of the selected file.
6. The copy will be named "Copy of..."; for example, if you make a copy of "test.htm", the new copy will be named "Copy of test.htm".

Copy to Floppy Diskette:

1. Insert a formatted diskette in your floppy drive
2. Locate your **INTRANET** folder
3. Select the file you want to copy by single-clicking it
4. Right-click on the file and select **Send To ® 3½ Floppy** from the shortcut menu
5. The file will be copied to the floppy diskette

From within FrontPage:

1. Open your intranet in Microsoft FrontPage and go to *Folders* view.
2. Click on the file that you wish to copy
3. Press **CTRL+C** then **CTRL+V** to make a copy of the selected file.
4. The copy will be named "..._copy(1).htm"; for example, if you make a copy of "test.htm", the new copy will be named "test_copy(1).htm"

Make all of your changes to the original file, not the copy. If you need to restore from the copy that you made, delete the original file and rename the copy to the original file name.

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Using WinZip

The WinZip utility, which is included in the Extras folder of your *AgencyCentral CD* or available for download at www.winzip.com, creates a compressed archive file containing all of the files in your intranet. If you have WinZip installed on your PC:

1. Open *My Computer* or *Windows Explorer*
2. Locate your INTRANET folder.
3. Right-click on the folder
4. Select **Add to C:\INTRANET\intranet.zip** from the shortcut menu that appears.
   Note: If you have your intranet installed on a network drive, the C: will be replaced by your network drive.
5. All of the files will be compressed into a single file named intranet.zip, which can then be copied to a floppy diskette or another hard drive for safekeeping.

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Troubleshooting

While we have taken every precaution to prevent problems with the installation and operation of your intranet, inconsistencies in server and workstation configurations make it impossible to avoid some errors. This section provides instructions on how to fix the most common problems that our users encounter after installing their intranet and/or Microsoft FrontPage.

Error opening Frontpage on network server

One of the following errors appears when opening the intranet in Microsoft FrontPage:

An unexpected error occurred accessing your FrontPage web files. Authors - if authoring against a web server, please contact the WebMaster for this server's site. WebMaster - please see the server's system log for more details.

Timed out while trying to connect to a server at <xxxxx> on port 80.

This error is caused by an incompatibility with the FrontPage Server Extensions that were installed with Microsoft FrontPage. To resolve this problem, instruct your network administrator to install the following file, which can be found on in the *Fixes* folder of your Intranet CD:

fpse2k_x86_ENG.exe

This file can also be downloaded from Microsoft's web site at the following URL:

http://msdn.microsoft.com/workshop/languages/fp/2000/winfpse.asp

In the *Download File* column of the table displayed on this page, click on the *English* hyperlink, which will take you the following page:

http://www.microsoft.com/Downloads/Release.asp?ReleaseID=33556

Download the file shown above and install it according to the instructions provided by the Installation Wizard that starts when you double-click on the EXE file.

This file must be installed on the workstation(s) running the FrontPage software, not on your network server.

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Server Error: Cannot Open File "G:\intranet_vti_pvt\Service.lck" for writing"

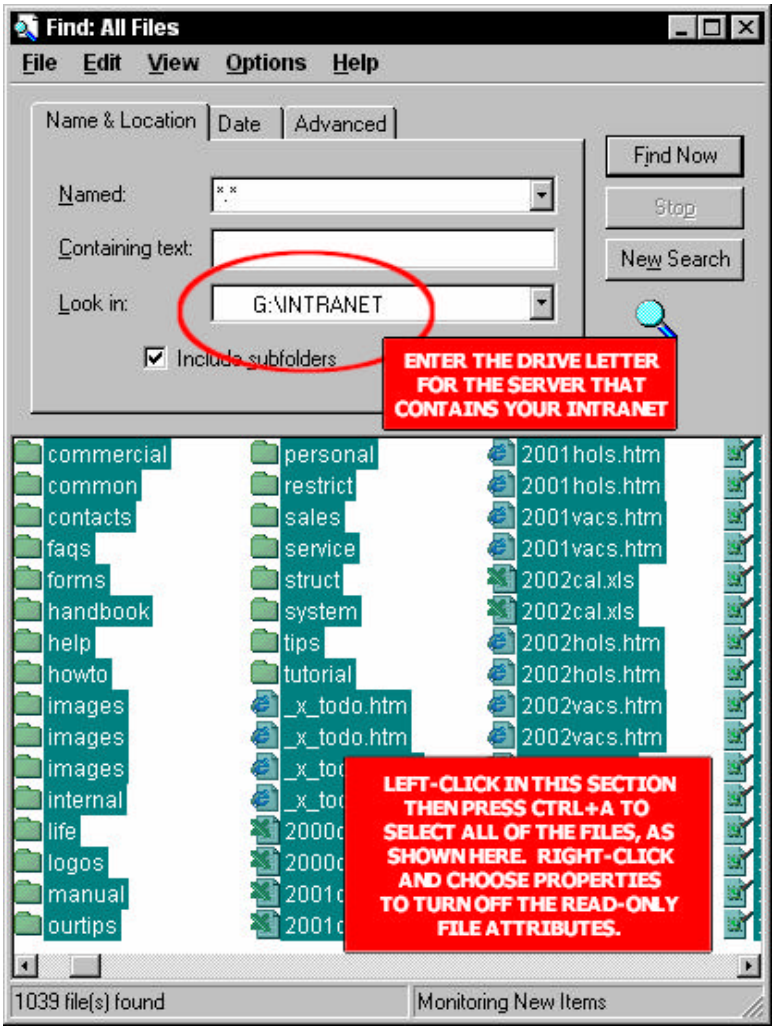
If this error appears when you open your intranet for editing, it is most likely caused by your network login.

- ❒ Has your system administrator changed your permissions?
- ❒ Did you sign on with a different login than you usually do?
- ❒ Check the file attributes of the files in the INTRANET folder and make sure that they are not set to "Read Only" access*

This error is basically telling you that you don't have the right to edit the intranet and these rights come from your server. Try closing all of your programs and logging out of the network, then back in. If the problem persists, ask your system administrator to check your login permissions to make sure that you have the proper authority over your intranet folder.

To change the file attributes:

1. Click on **Start** ® **Find** ® **Files or Folders**
2. Type ***.*** in the *File Name* field and your INTRANET folder in the *Look In* field.
3. When the files are listed, select them all by clicking on the first one then pressing **CTRL+A**.
4. Right-click and select **Properties**.
5. On the *General* tab, uncheck the **Read Only** field.
6. Click on **OK** to complete the process. It may take a few minutes.



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Server Error: "Web <Web Name> Is Busy..."

This error may occur when attempting to open the INTRANET web in FrontPage 2000 on a peer-to-peer network. It has happened on occasion immediately after installing the intranet. Caused by inadequate permissions on the INTRANET folder, the solution is to change the folder to "shared/full access" instead of "shared/read-only".

If you receive this error and changing the permissions for your INTRANET folder does not resolve the problem, further information is available in the Microsoft Knowledgebase at the following location:

http://support.microsoft.com/support/kb/articles/q266/2/16.ASP?LN=EN-US&SD=gn&FR=0

If you encounter other problems with the installation or operation of your intranet, especially immediately after loading it on your network, please contact us immediately at the numbers shown on the cover of this manual.

Getting the Help You Need

We hope that this manual has helped to provide an overview of the steps involved in maintaining your intranet. Please take advantage of the free trial access to our Agency Partners web site where we are constantly adding more and more useful information for your intranet, including how-to instructions, free downloads and technical support alerts.

You should have received an email about this site on the day that your CD was shipped to you, providing you with the necessary login information to see all of the benefits for yourself. If you didn't receive this information, please call 970-499-1897 or send an email to support@intranetconcepts.com and we'll set you up immediately.

We urge you to consider signing up as an Agency Partner, even on a temporary basis for the first three to six months. This will give you priority access to our support department as you become acquainted with this exciting new tool for your office. Details about this program can be found on our web site at www.intranetconcepts.com as well as on the intranet CD in the PDF documents entitled *Agency Partnership Program* and *Partnership Agreement.*

To offer suggestions for improvements to this manual, please send your e-mail to suggestions@intranetconcepts.com.

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